USER MANUAL

NeatQuote

From cleaning quote to payment

For cleaning businesses that want to price a job, schedule visits, track actual time and issue an invoice.

iPhone · iPad · Mac

Android phone and tablet · Web app

Updated 25 November 2026

This edition reuses the established workflows and adds current features, Android and the web. Screenshots and the main video show the Apple edition with fictional data.

View platforms, downloads and the latest guide

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Navigation may differ between platforms. Check the app page for the availability of each edition.

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Choose a device and get started

iPhone, iPad, Mac, Android phones, Android tablets and browsers have different first-start steps. The chapters below explain the shared workflows.

1. Get NeatQuote from the official store for your device. See platforms and download status on the app page. App Store and Google Play show when an edition is available in your country.
2. On **iPhone, iPad and Mac**, you can start a personal workspace without a company account. Choose sample data first if you would like to practise.
3. On **Android phones and tablets**, create or sign in to a company account. The account also verifies purchases and trial access when you choose to keep your work on the device.
4. For the **web app**, use the company's browser access. Start with Web access step by step; no mobile-app installation is needed inside the browser.
5. Switch to your own workspace before entering real customer data. Always check the workspace name and storage status. Navigation and button names may vary between platforms.

About screenshots and the video

The existing screenshots and main video show the Apple edition with fictional data. Use the updated written chapters for new features and Android or browser setup. Update all devices before sharing new types of records. Older editions may reject a newer format.

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Getting started

Set up your own workspace and choose the defaults NeatQuote should suggest on new quotes.

1. Choose **Explore with sample data** on the welcome screen to try a complete example. Choose **Build my first quote** when you are ready to use your own information.
2. If you are already in the sample, find **Start my own workspace** under **Storage & backup** before entering real customer details.
3. Enter your trading name, what an hour of labour costs your business and the applicable tax rate. You can change your defaults later under **Your business**.
4. Review your business contact details too. They help the customer identify and contact you from the documents you issue.

Example

The hourly cost is what you pay to provide an hour of labour. You calculate the selling price after entering time and the other job costs.

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Use the daily overview

See the next useful action once the business has its first records.

1. Open **Overview** for today’s planned visits, quotes awaiting a reply, completed work to invoice and overdue invoices.
2. Select the relevant item to open its records. Check the workspace, date and individual record before following up or invoicing.
3. Use filters for drafts, awaiting reply, accepted work, declined, expired and archived quotes to find the right list.
4. Review different currencies separately. A recorded payment and a completed visit still need to match the real work and your bank records.

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Resume an unfinished quote

The updated Apple edition keeps a local working draft while you edit.

1. Start a quote and enter what you know. The unfinished edit is kept separately from a finished quote and issued documents.
2. If the app closes or you are interrupted, open **Overview** → **Unfinished quotes** and select the draft.
3. Review incomplete number entries, including minutes. Correct them to valid values before saving the finished quote.
4. Save the finished quote and check the customer PDF before sharing. Recovering a working draft does not send anything or issue a document.

A working draft on this device

The recovery draft belongs to this device. Use the normal save and sharing actions when the quote should become part of the workspace. Local draft recovery is separate from a backup across platforms.

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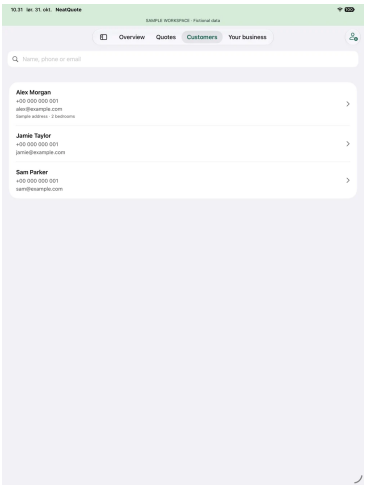
Customers and the first quote

Reuse customer details and find previous quotes on the same customer record.

1. Open **Customers** → **New customer**. Enter the name, service address and contact details, then save. Reopen the record to check the details.
2. Choose **Create a quote** in **Overview**, or start a quote from the saved customer.
3. Add a descriptive title on **The job**. Choose a saved customer, or enter the contact details directly on the quote.
4. Choose the pricing route early. For calculated pricing, **The job** describes the agreement, **The work** estimates time, and **The price** brings together costs and the customer amount. For your own price, enter the amount and scope directly.

Example

“Office cleaning every Thursday” makes an easy title to recognise. Enter the service address so you can verify the visits and customer documents.



The customer list. Sample data.

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Scope, time and staffing

Describe what the customer gets per visit and include the time for the whole crew.

1. On **The job**, choose a service and frequency. Check the quote date, validity, payment terms and agreed start date, if any.
2. Use **Notes for your client** for access instructions and any boundaries the customer should see on the quote.
3. On **The work**, choose the tasks, enter quantities and minutes per unit, and remove work outside the scope. Use **Add a task** for extras such as oven cleaning.
4. Under **Time that also matters**, enter the crew size, travel time per person and any time allowance. Check the paid person-time in the calculation.

Example

Two people on site for 60 minutes represent two paid person-hours before paid travel or a time allowance. A recurring cleaning quote gives the price for one visit.

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Price, costs and margin

Use the calculation to see what remains from the selling price after the expected costs.

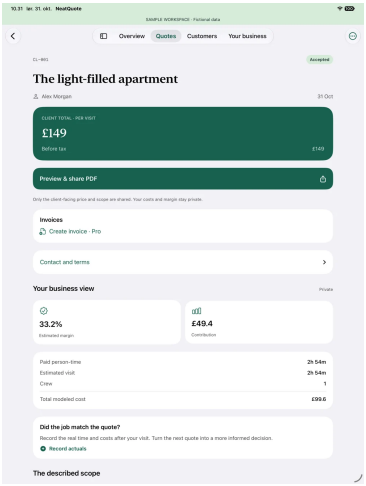
1. Open **The price → Edit costs for this quote**. Review the loaded hourly cost, supplies, travel, allocated overhead and any relevant payment fees.
2. Set your target margin. Review the suggested selling price before tax, estimated contribution and the customer's total.
3. If you choose a different selling price, check the resulting margin before saving.
4. Reopen the saved quote. Use **Price calculation** to review your assumptions and the PDF preview to check what the customer will receive.

Example

A pre-tax selling price of 1,000 and estimated costs of 750 leave a contribution of 250 and a margin of 25 percent.

I already know the price

Choose **Help me calculate** or **I know my price** early in the quote. For your own price, enter the customer's amount and an explicit description of the work it covers. You do not have to enter example minutes to make a fixed-price quote. Without known costs, a sales amount alone does not establish your profit.



Customer total on the saved quote. Sample data.

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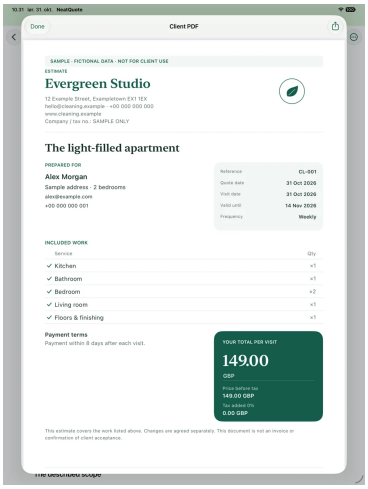
Customer PDF and acceptance

Review the document, share it with the customer and record the outcome on the quote.

1. Open the saved quote and **Preview and share PDF**. Check the customer, scope, price, dates and terms. Internal hourly costs and margin stay in the calculation.
2. Share the PDF from the preview or choose **Send to customer**. Check the recipient and attached document before sending.
3. Record the quote as sent after sharing. Record it as accepted when the customer confirms the agreement.
4. If your company has online price acceptance, publish a link to the reviewed quote and follow its status in NeatQuote.

Before you send

Review the PDF to see exactly what reaches the customer. If you change the quote, review the new version before sharing it.



The customer quote PDF. Sample data.

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Declined, expired and archived quotes

Keep the quote list useful while preserving document history.

1. Open a quote awaiting a customer reply. When the customer says no, choose **Mark declined** or the corresponding decline action.
2. Use **Reopen quote** if discussions resume. Check validity, price and scope before sharing a new agreement.
3. An unanswered sent quote shows **Expired** after its validity date. An accepted quote does not expire simply because that date has passed.
4. Choose **Archive** to clear a quote from the active list. Open archived quotes and unarchive the record to work on it again.
5. Check any active online links before recording a local decline. Follow the app’s instructions if an online quote must be closed first.

History remains available

Archiving organises the list. Recorded customer acceptance, previously issued documents and their originals are preserved.

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Agreements, calendar and visits

Use an agreement to plan recurring work and its individual visits to record completion.

1. Open the accepted recurring quote and choose **Create agreement**. Check the start date and repeat frequency before saving.
2. Open the agreement to check the dates and statuses of individual visits.
3. Open **Calendar** from **Overview**. Pick **Day** or **Week**, move to the right date and open a visit to review the details.
4. After the work is done, mark the individual visit complete under **Agreements**. When invoicing, select the eligible completed visits you want to include.

Example

For four weekly office cleans, check each date in the agreement and select the completed visits for the invoice.

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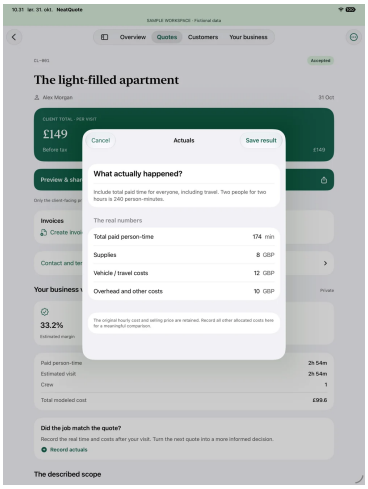
Timer and actual costs

Compare your quote with the time and costs the job actually required.

1. Open the timer on the quote when work starts. Start it, pause when needed and check the duration before recording it.
2. If you already know the total paid time, use **Actuals** → **Record actuals**.
3. Enter paid person-time for the whole crew, including paid travel. Update the costs if supplies or travel differed from your estimate.
4. Save and compare the result with the quote. Use the difference when planning the next visit or costing a new quote.

Example

If a clean consistently takes longer than expected, check which tasks or time allowances need updating in the next calculation.



Recording actuals. Sample data.

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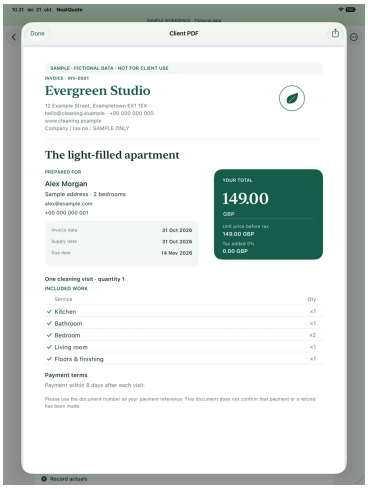
Invoice draft and issued original

Set up the payment instructions and check the draft before issuing it.

1. Open **Your business** → **Payments** → **Bank and payment details**. Save the business payment instructions for new invoices.
2. On an accepted quote, choose **Invoices** → **Create invoice**. For recurring work, start from **Agreements** and select completed visits eligible for invoicing.
3. Check the customer, date, due date, lines, amount and payment instructions. Choose **Issue invoice** and confirm. NeatQuote assigns a number and keeps the original.
4. Open the issued invoice PDF to review it and share it with your customer.

Issuing and sending

Once the invoice has a number, share it with the customer from its PDF view or the relevant sending option.



A sample invoice. Sample data.

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Payments, credits and online options

Record payments once verified and keep the original documents when correcting an invoice.

1. When a bank payment arrives, open the invoice and choose **Mark as paid**. Remove the payment record if you marked it by mistake. This changes the status in NeatQuote.
2. Choose **Create full credit note** on the issued invoice, enter the reason and review the confirmation. Keep and share the numbered documents as needed. Issue a new invoice separately if a corrected one is required.
3. Handle any refund separately. The credit note records the document correction.
4. Where online card payments are available, the company owner connects a supported Stripe account under **Payments**. Review an eligible invoice before sharing the payment link. Stripe provides the checkout.

Reconciliation

Match the amount, currency and invoice number against the bank receipt or card payment record before chasing an unpaid amount.

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Company, employees and access

Use the company workspace for work you need to share with employees.

1. Open **Your business** → **Company & employees**. The owner can create a company and invite staff.
2. Employees select **I have an invitation** and use the company details from their administrator.
3. As owner, review each person's access. Company permissions control who can see customer details, selling prices and internal costs.
4. Share the jobs the team needs. Check the company workspace if an employee is looking for work you published.

Workspaces

The company workspace has its own sign-in. Company records are separate from your personal backup and private iCloud sync.

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Personal or company workspace

Choose where the work belongs before connecting synchronisation.

1. A **personal workspace** is separate from the company's shared records. On Apple devices, private iCloud can keep supported data together on your own Apple devices using the same iCloud account, once connected.
2. A **company workspace** uses company sign-in and the company service. Verify the company, user and permitted access before creating or changing shared records.
3. Share or connect only the workspace and records that belong in the company. Read the summary before confirming a transfer or opening an existing shared workspace.
4. Check storage status and the latest sync. Resolve a pending upload or a problem before issuing another document that could duplicate the first.
5. If a record is missing on another device, check the company, workspace, permissions and connection first. Export a backup before choosing a restore that replaces local data.

Signing in does not move personal records

Company sign-in, web setup and workspace switching do not automatically move personal customers or documents into the company. Private iCloud and company access are different connections. An exported backup is also separate from synchronisation.

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Web access step by step

Use the same company account from a supported browser on a computer or tablet.

1. Open the company area in NeatQuote and verify that you are signed in as the owner of the correct company. Browser access requires the relevant app or company entitlement.
2. Open the web app from the app page and choose company sign-in. Use your usual company login where offered, or an already registered passkey. A passkey is optional; the following steps explain how to set one up.
3. Open **Synchronisation** → **Web access** → **Set up web access** in the updated NeatQuote app. If the button is not in your edition yet, update when the new release is available or use an already registered passkey.
4. If the app confirms that **your passkey is ready**, open the web app and use that passkey to sign in.
5. Otherwise, the app displays a **private setup code**. Open the web app using the app's link and follow the website's setup to create your own passkey. The code lasts 24 hours; generating a new code replaces the previous unused code.
6. Check the company and workspace after signing in. Open the records and original documents you have shared with the company. If setup fails, verify company sign-in, app access and the connection, then try again.

Keep access private

Never share a setup code or passkey with a colleague or customer. Employees use their own permitted access. The browser company area shows shared company data; personal Apple records do not appear there automatically.

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PDF, CSV, backups and iCloud

Choose the right file for the job. The customer PDF, spreadsheet and backup serve different purposes.

1. Open the invoice to retrieve the exact issued PDF. Combine several invoice PDFs where the option is available.
2. Export a CSV from **Finance** to review selected figures in a spreadsheet or carry them over to your accounting records.
3. Open **Your business** → **Storage & backup**. Export a full backup of your personal workspace and save it somewhere secure.
4. Before importing a package, check what it will replace. Configure optional private iCloud sync separately.

Before importing

Export the current workspace first. After import, check that you can open the customers and documents you expected to restore.

Excel - Danish format

When exporting CSV, choose **Standard CSV** or **Excel - Danish format**. Danish format uses semicolons between fields and decimal commas. Keep standard CSV when the receiving system expects it. A CSV is a data export; it does not replace issued PDF originals.

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Language, Pro and support

Adjust customer documents, restore purchase access or get help with a specific task.

1. Choose the app language under **Your business → App and help**. Open **Prices and PDFs** to set the default currency for new quotes. In **Customer PDF**, review the logo, colour and document language.
2. Find Pro plans under **App and help → Make room for more work**. On Apple, eligible users get 14 days from their first App Store download. The trial ends without an automatic charge.
3. Use **Restore purchases** with the Apple Account that made the purchase. Manage or cancel your plan through your Apple Account. Saved documents remain available.
4. **A visit is missing from invoicing.** Check that the visit is marked complete and that you opened the correct agreement.
5. **The price looks wrong.** Review paid person-time, costs, margin and any manually offered price on the saved quote.

Contact

If the issue persists, contact NeatQuote support. Include the device, app version and steps that led to the issue. Redact customer details in screenshots.

Purchases and access on Apple, Android and the web

On Apple, use **Restore purchases** with the Apple account that bought the subscription. On Android, use purchase and restoration with the same Google account that bought it in Google Play. Manage or cancel in the store that bills you. Company sign-in can grant access to shared company records according to your permissions; it does not move the subscription between stores. Do not buy another subscription simply to troubleshoot access.

The Android trial is verified after company sign-in and an authorised Google Play installation. Changing device or platform does not restart the company’s 14 days. The trial requires no card and starts no automatic charge. Deleting an account does not cancel a store subscription. Saved documents remain readable and exportable after access expires.

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